How to Use the Sustainable Buildings Checklist

EPA's ENERGY STAR Portfolio Manager tool helps you measure and track the energy use, water use, and greenhouse gas emissions of your buildings, all in a secure online environment. You can use the tool to identify under-performing buildings, set investment priorities, verify efficiency improvements, and receive EPA recognition for superior energy performance.

The Sustainable Buildings Checklist was first developed for United States federal building managers for compliance with the Federal Guiding Principles for High Performance Sustainable Buildings. The Guiding Principles are intended to help federal agencies establish common strategies for operating and maintaining buildings in a sustainable manner, and include a focus on energy efficiency, water conservation, and indoor environmental air quality. The Checklist is a valuable tool for evaluation of the sustainability of existing buildings of all kinds, not just U.S. federal buildings. Note that use of the Checklist is completely voluntary, has no impact on any metrics calculated in Portfolio Manager, and is not associated with any EPA recognition. Follow this guide to learn more about how to use the Sustainable Buildings Checklist in Portfolio Manager.
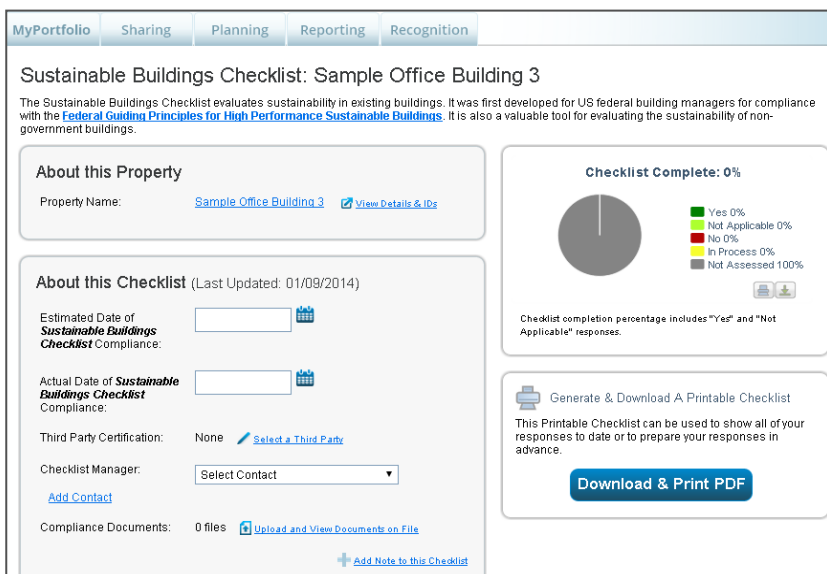
> ℹ️ **Sustainable Buildings Checklist**
>
> 1. Access the Checklist
> 2. Review and Complete the Checklist
> 3. Track Progress of Checklist

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1   **Access the Sustainable Buildings Checklist**

To begin using the Checklist for one of your properties, log in to your Portfolio Manager account and follow these steps:

1. Click the property's name on the **My**Portfolio** tab and then select the **Goals** tab.

2. Scroll to the bottom of the page to see the **Sustainable Buildings Checklist** section.

3. Click **Start the Checklist** to begin working on the Checklist, or if you have already started the Checklist, click **Access the Checklist**.

The top half of the Checklist page provides an overview of your activity. The pie chart on the right-hand side updates to reflect your progress as you complete the Checklist questions on the bottom half of the page.

✓ In the **About this Checklist** section, enter a goal date for achieving all items in the Sustainable Buildings Checklist. This date should be informed by an assessment of your property's current performance, and will help you determine what percent of your portfolio will be compliant with the Checklist at a chosen date. You can change this date at any time. You can also enter the actual date of Checklist compliance here, once achieved, for record-keeping purposes.

✓ If the property has already been certified by a third party (e.g., LEED, Green Globes), or if you want to input a target date for third-party certifications, click the **Select a Third Party** link.

✓ Identify the **Checklist Manager** (e.g., primary point of contact for the Checklist) from the list of contacts in the drop-down menu. If the person you want to select is not listed, add them as a contact via the **Add Contact** link.

✓ You can also choose to provide supporting **Compliance Documents** in this section. You can **Upload and View Documents on File** via the link, or you can choose to manually **Add Notes to this Checklist**. If you decide to upload documentation in the next section of the Checklist, the documentation will be accessible here.

2 Review and Complete the Sustainable Buildings Checklist

The **Complete the Sustainable Buildings Checklist** section lists the five Federal Guiding Principles on the left-hand side of the screen. To view the items included under each Federal Guiding Principle, click the blue arrow to the left of the headings and sub-headings. All of the bulleted items are parts of the Checklist that you can complete, and which you can click on to navigate through the Checklist manually.

The right-hand side of the screen is the workspace where you will respond to each of the Checklist elements. Click **View References & Resources** to find additional references and resources to help you complete the checklist.

✓ As you complete the Checklist, review the descriptions of each Checklist item and choose the appropriate option to indicate achievement.

NOTE: For certain items under the **Optimize Energy Performance** and **Protect and Conserve Water** headings, energy and water information that you have entered into Portfolio Manager for your property will pre-populate to help you complete the Checklist item.

✓ If you would like to include supporting documentation for any individual component of the Checklist, click **Upload and View Documents on File**.

✓ Indicate the **Responsible Team Member** for the associated Checklist item by entering the person's name; the name does not need to be in your list of contacts in order to enter it.

✓ If you would like to include written notes, explanations, or descriptions associated with a Checklist item, add it in the **Notes/Comments** box.

✓ Click **Save & Continue** to move through the Checklist, or click **Save & Close** to exit at any time.

3   **Track Progress and Print Checklist**

✓   View your progress in the pie chart on the top right-hand side of the screen, or on the bottom left-hand side of your property's **Goals** tab. The pie chart will update to reflect your progress as you answer the Checklist questions.

✓   You can print or download the pie chart by clicking on the buttons in the bottom right-hand corner of the image.

✓   You can output your Checklist progress in two ways:
   a.   For a formatted document, click **Download & Print PDF** on the right-hand side of the **Sustainable Buildings Checklist** page, under the pie chart.
   b.   For a spreadsheet-based summary of your Checklist details, click the **Reporting** tab and generate the **Sustainable Buildings Checklist Report**, available in the list of templates and reports.

💬 *Learn More!*

To learn more about Portfolio Manager, visit www.energystar.gov/benchmark.
To get answers to your questions, visit www.energystar.gov/buildingshelp.